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EZ-Broker

Internet based solution for all phases of the structured settlement process

- ►One time input or download of case data
- ►Can be used online or offline
- ►Diary functionality includes automatic reminders
- ►Interfaces with embedded life company software for quoting and illustration
- ►Proposal management systems allows full customization
- ►Integrated post-settlement document processing
- ►Modification of documents as permitted by life companies
- ►Save print, fax and e-mail capabilities for any documents within the software
- ►Integrated life case plans and economic loss analysis through StructureOnline partners
- ►Automatic referral of cashouts and upfront cash to designated Financial Planners
- ►Data archiving and reporting available through StructureOnline
- ►Interfaces with broker company systems

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EZ-Lead (EZ-Broker included)

Employs data mining and knowledge technology to identify structure candidates in claims systems

- ►Electronic interface with claims systems
- ►Automatic analysis of claims to identify structure opportunities
- ►Knowledge based system proposes appropriate structure products
- ►Claims users can propose structure programs or forward referrals to brokers

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EZ-Reports (for Brokers)

Full-featured reporting module for EZ-Broker

Local:

- ►Full sort and selection criteria (e.g. by life company, client-broker)
- ►Open cases
- ►Settled cases
- ►Closed cases
- ►Premium and/or commission totals
- ►Case related assignments for support staff
- ►Many more will be defined and developed as per industry need

Remote:

- ►Any Reports out of the Archived Data
- ►Many more will be defined and developed per industry need

Fig 1A

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EZ-Reports (for Life Companies)
Full-featured reporting module for Life Company Executives

- ►Full sort and selection criteria (e.g. by broker company, individual broker insurer)
- ►Premium and number of cases funded
- ►Cases quoted
- ►Premium by structure product
- ►Cases accepted/rejected under partnership arrangements (last right of refusal)
- ►Cash referred to financial planners
- ►Many more will be defined and developed as per industry need

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EZ-Updates
Internet-based support for delivery of life company software, updates and rate changes

- ►All functions are provided through the StructureOnline portal
- ►Download of life company software by authorized parties
- ►Distribution of software upgrades and patches
- ►Distribution of rate changes
- ►Automatic notification of updates to EZ-Broker users

StructureOnline Services

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EZ-Sync
Allows full-use of StructureOnline's broker services by broker companies, individual brokers and support staff

- ►Allows brokers to download portable version of EZ-Broker for use offline
- ►Brokers and support staff can synchronize their work, data, schedule, diary cases, etc.
- ►Software updates are executed automatically
- ►Rate changes are made automatically

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EZ-Support
StructureOnline help desk for life companies and brokers

- ►Technical support for life company software
- ►Support for life products
- ►Maintain latest life company software on the web for download
- ►Maintain latest software patch for life company, software on the web for download
- ►Maintain rate changes on the web as publication
- ►Other services based on user demand

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Alternative Dispute Resolution Provider Affiliation
Brings a new source of cases to the structure industry

- ►Custom templates for ADR web pages
- ►Allows structured settlements to be offered as part of the ADR process
- ►Structure products from participating life companies offered through StructureOnline
- ►Referral of cases to participating brokers facilitated by StructureOnline

Fig. 1B

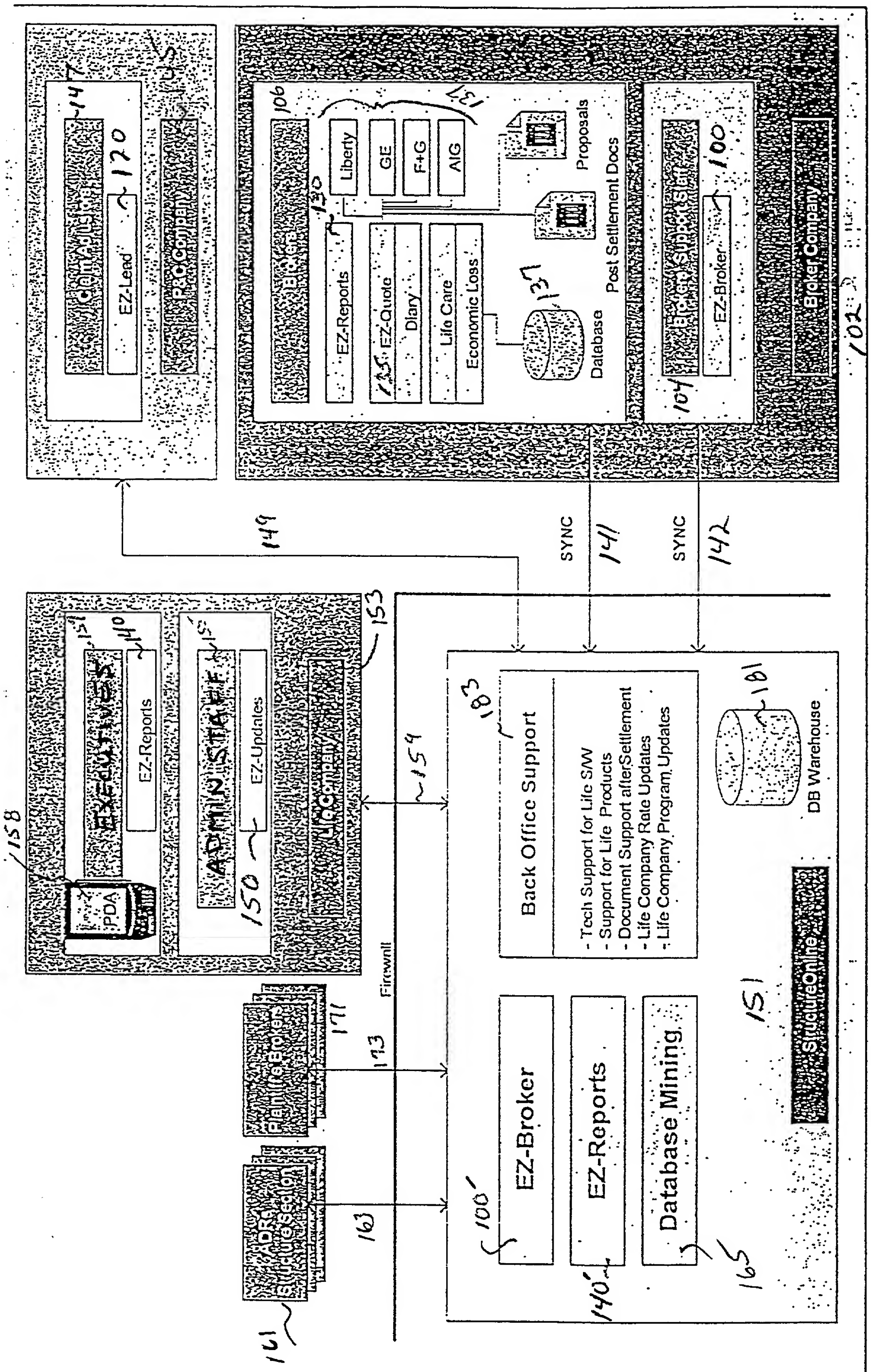
Claim Adjuster
EZ-Lead
P&C Company
Brokers
EZ-Reports
EZ-Quote
Diary
Life Care
Economic Loss
Liberty
GE
F+G
AIG
Database
Post Settlement Docs
Proposals
Broker Support Staff
EZ-Broker
Broker Company
SYNC
SYNC
EXECUTIVES
EZ-Reports
PDA
ADMIN STAFF
EZ-Updates
Life Company
Firewall
Plaintiff Brokers
ADRs Structure Section
EZ-Broker
EZ-Reports
Database Mining
Back Office Support
- Tech Support for Life S/W
- Support for Life Products
- Document Support after Settlement
- Life Company Rate Updates
- Life Company Program Updates
DB Warehouse
StructureOnline

FIG. 2

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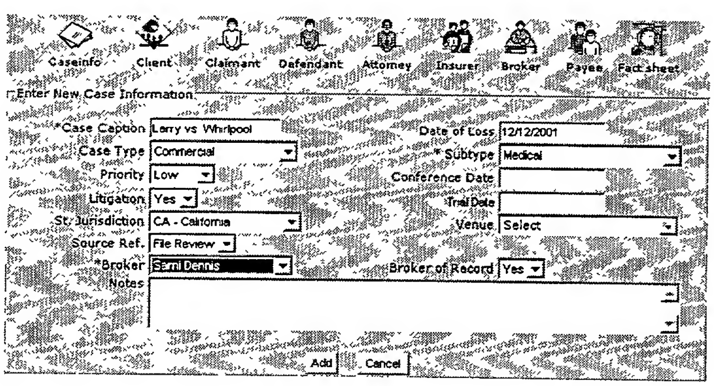
Online Broker (Web version of EZ-Broker)
Allows easy access to structure products to qualifying professionals, generates new structure business

- ▶Service offered to qualified parties via the Internet
- ▶StructureOnline facilitates company approval and licensing issues

FIG. 1C

Creating a New Case



- **Mandatory Field Requirements for opening a case**
  - **Case Caption**
  - **Broker and Broker of Record**

FIG 3

Creating a New Case (continued)

- Add / Edit Insurer Client Information from Client Tab
- National Account Check Box for narrowing your search
- Mandatory fields for Insurer
  - Insurer Company Name
  - Date of Case Receipt

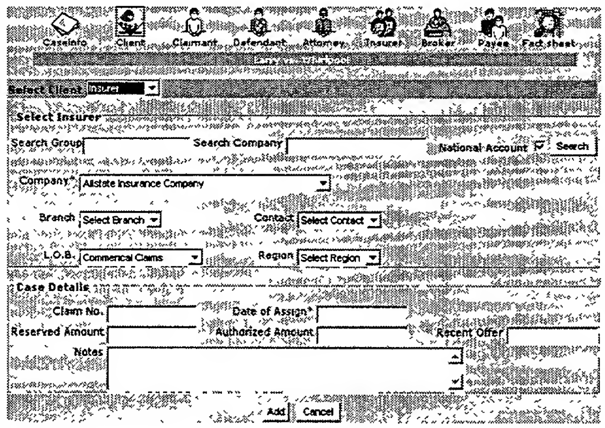
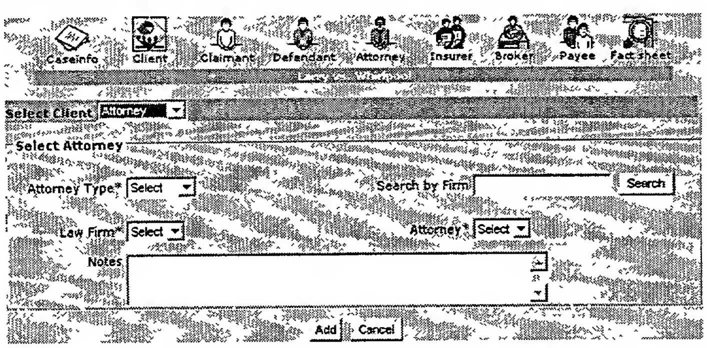


FIG 4

Creating a New Case (continued)

- Add / Edit Law Firm Client Information from Client Tab

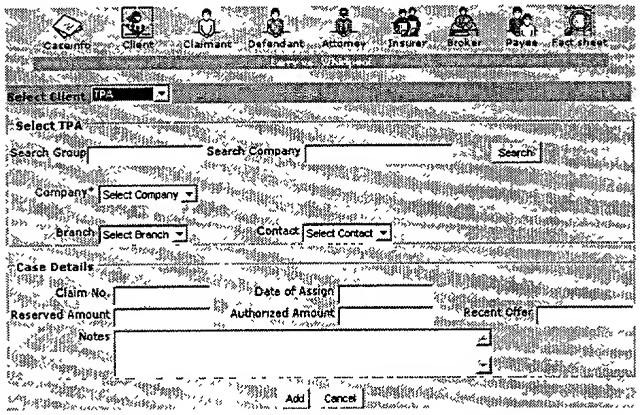


- Mandatory fields for Law Firm
  - Attorney Type
  - Law Firm Name
  - Attorney Name

FIG 5

Creating a New Case (continued)

- **Add / Edit TPA Client Information from Client Tab**

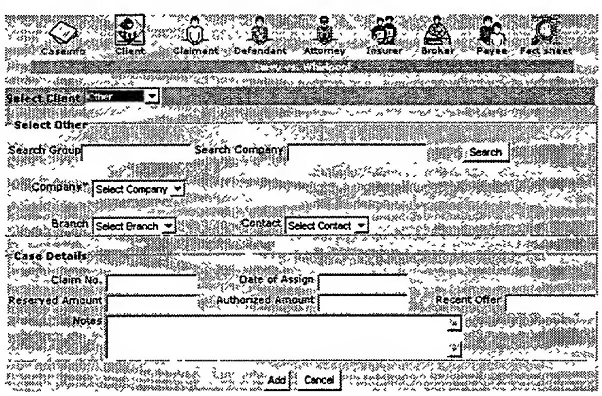


- **Mandatory fields for TPA**
  - **TPA Company Name**

FIG 6

Creating a New Case (continued)

- **Add / Edit Other Client Information from Client Tab**



- **Mandatory fields for Other Client**
  - **Other Company Name**

FIG 7

Creating a New Case (continued)

- Add / Edit Claimant Information from Claimant Tab

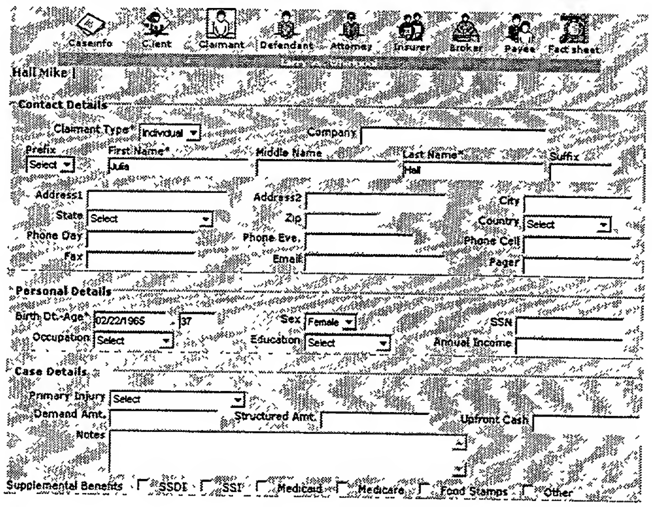
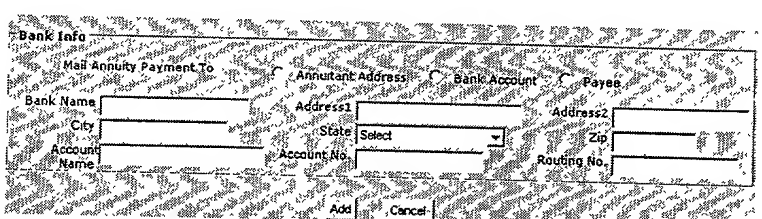


FIG 8

Creating a New Case (continued)



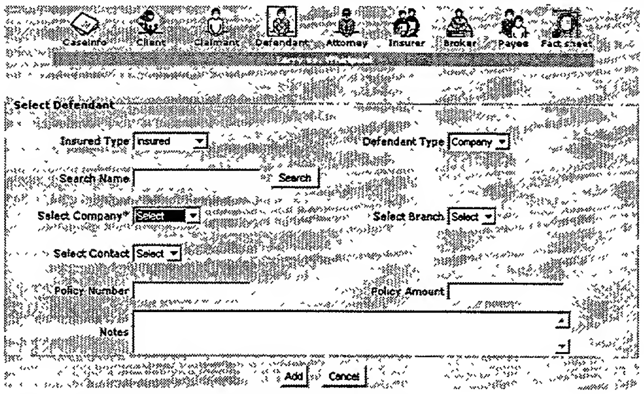
- Mandatory fields for Claimant
  - First Name and Last Name
  - Date of Birth and Age

- Contact Details
- Personal Details
- Case Details
- Bank Information

FIG 9

Creating a New Case (continued)

- Add / Edit Insured Defendant Company Information from Defendant Tab

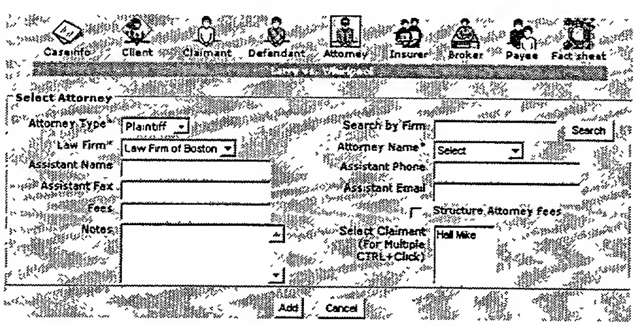


- Mandatory fields for Insured Defendant
  - Company Name

FIG 10

Creating a New Case (continued)

- Add / Edit Plaintiff Attorney Information from Attorney Tab

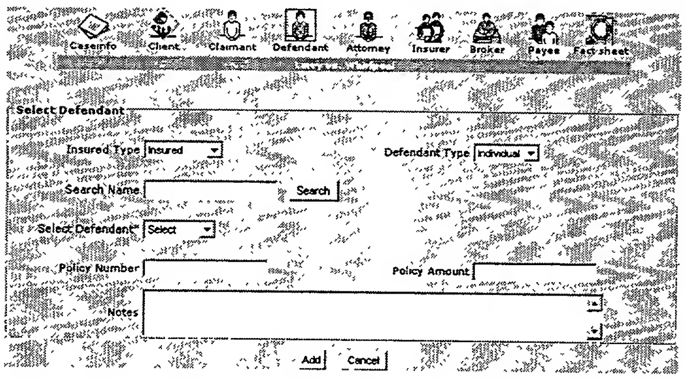


- Mandatory fields for Plaintiff Attorney
  - Attorney Type
  - Law Firm
  - Attorney Name

FIG 13

Creating a New Case (continued)

- Add / Edit Insured Defendant Individual Information from Defendant Tab



- Mandatory fields for Individual Insured Defendant
  - Defendant Type

FIG 11

Creating a New Case (continued)

- Add / Edit Self Insured Defendant Information from Defendant Tab
- Mandatory fields for Self Insured Defendant
  - Company name

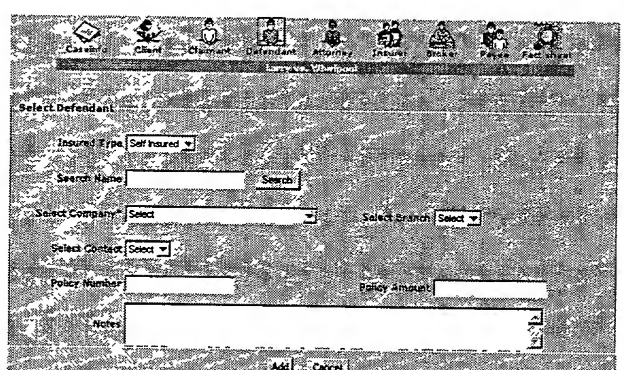
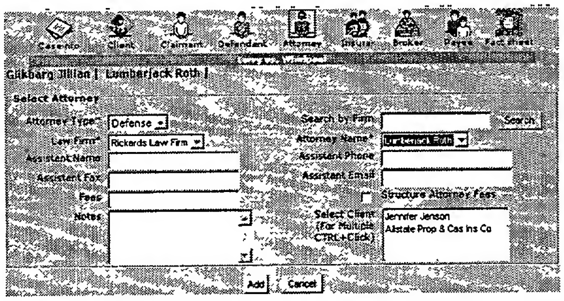


FIG 12

Creating a New Case (continued)

- Add / Edit Defense Attorney Information from Attorney Tab

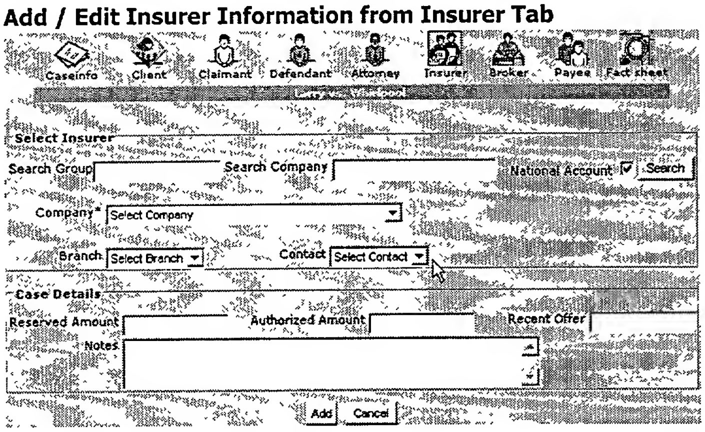


- Mandatory fields for Defense Attorney
  - Attorney Type
  - Law Firm
  - Attorney Name

FIG 14

Creating a New Case (continued)

- Add / Edit Insurer Information from Insurer Tab

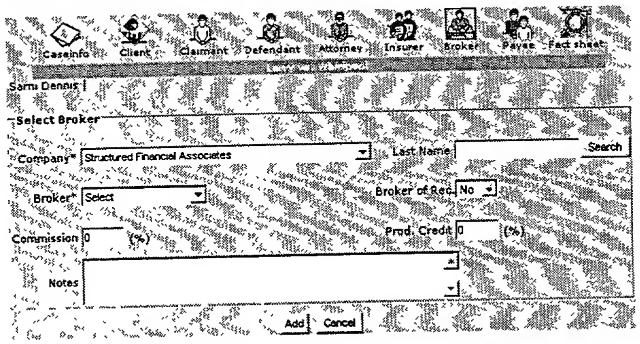


- Mandatory fields for Insurer
  - Company Name

FIG 15

Creating a New Case (continued)

- **Add / Edit Broker Information from Broker Tab**



- **Mandatory fields for Broker**
  - **Broker Company Name**
  - **Broker Name**

FIG 16

Creating a New Case (continued)

- **Add / Edit Payee Information from Payee Tab**
- **Mandatory Fields**
  - **First Name**
  - **Last Name**

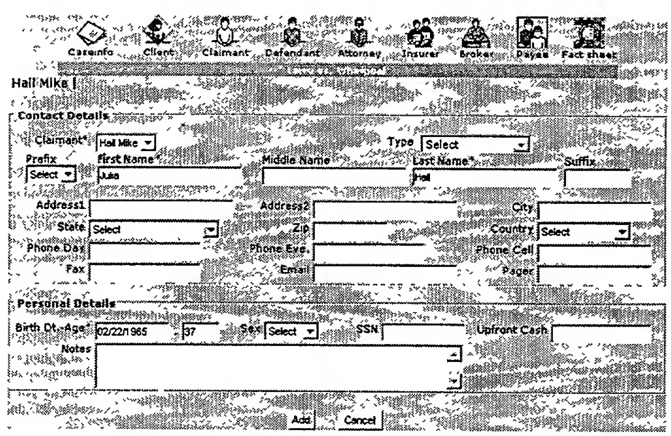
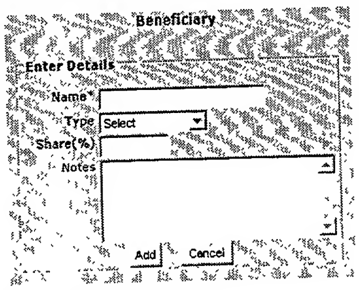


FIG 17

Creating a New Case (continued)

- Add / Edit Beneficiary Information from Payee Tab



- Mandatory Fields
  - Name

FIG 18

Managing your Diary

- Types of Companies
  - Assignment Company
  - Broker Company
  - Insured Defendant
  - Insurance Company
  - Law Firm
  - Life Company
  - Other
  - Self Insured Defendant
  - TPA

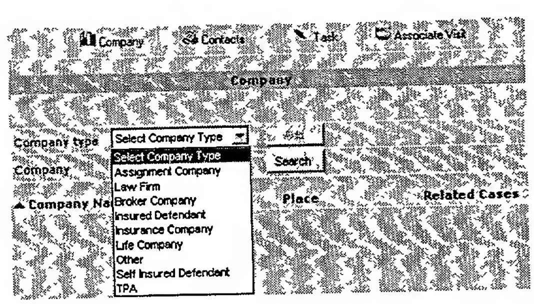
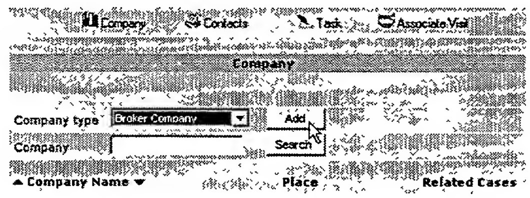


FIG 19

Managing your Diary

- **Open your Diary & Search & Sort / Add a Company by Type**



- **View Cases related to Company from search result**

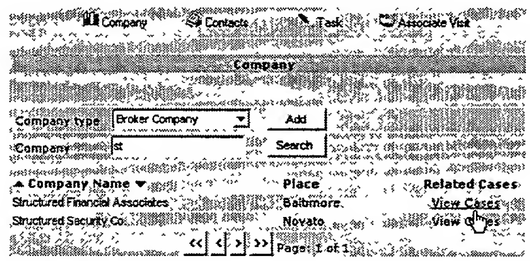


FIG 20

Managing your Diary

- **Categories of Companies**
  - **Public**
  - **Private**

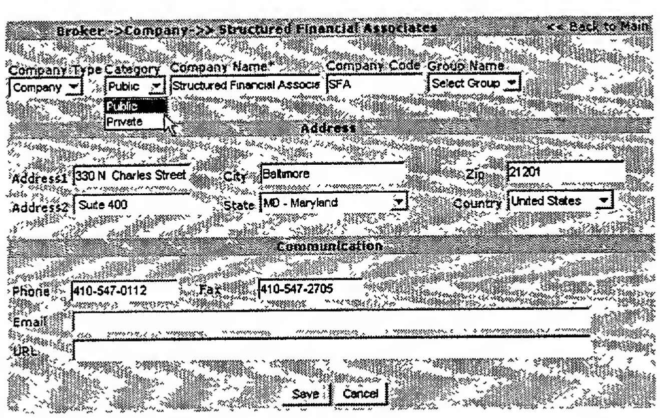


FIG 21

Managing your Diary (continued)

- **Contact Listing at each Level**

FIG 22

Managing your Diary (continued)

- **Remember to use <Type = Company>, if desired to show under Drop Down List**

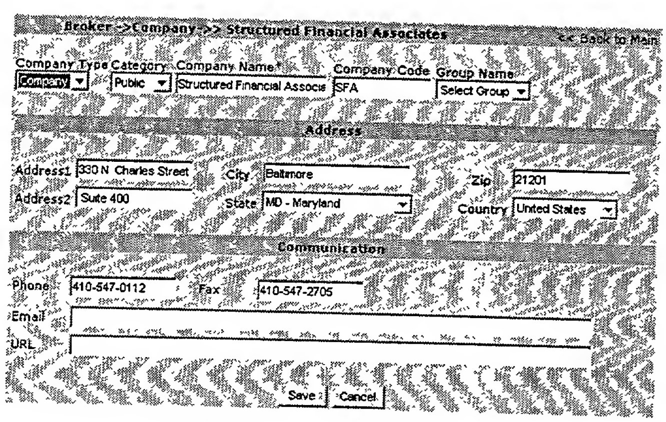


FIG 23

Managing your Diary (continued)

- **Search Contact by First Name, Last Name and/or Type**

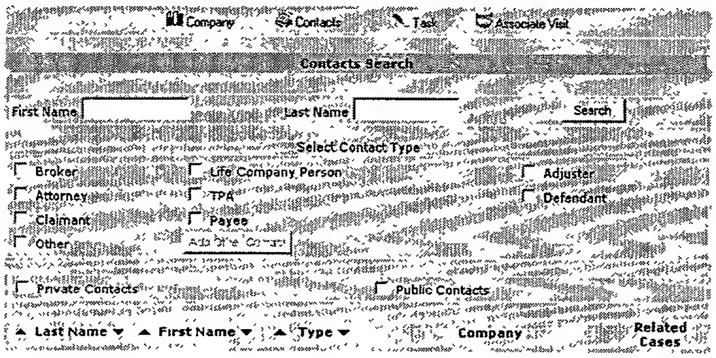
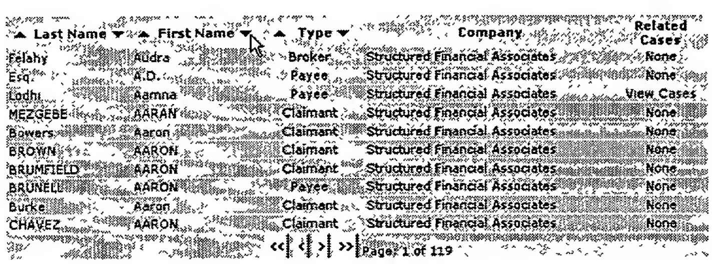


FIG 24

Managing your Diary (continued)

- **Sort searched contacts using arrows**



Last Name	First Name	Type	Company	Related Cases
Felahy	Audra	Broker	Structured Financial Associates	None
Esq.	A.D.	Payee	Structured Financial Associates	None
Lodhi	Aamna	Payee	Structured Financial Associates	View Cases
MEZGEBE	AARAN	Claimant	Structured Financial Associates	None
Bowers	Aaron	Claimant	Structured Financial Associates	None
BROWN	AARON	Claimant	Structured Financial Associates	None
BRUMFIELD	AARON	Claimant	Structured Financial Associates	None
BRUNELL	AARON	Payee	Structured Financial Associates	None
Burke	Aaron	Claimant	Structured Financial Associates	None
CHAVEZ	AARON	Claimant	Structured Financial Associates	None

<< < > >> Page: 1 of 119

FIG 25

Managing your Diary (continued)

- View cases related to Contact from search result

Last Name	First Name	Type	Company	Related Cases
Wallmann	Achim	Broker	Diversified Settlements, Inc.	None
Swebson	Alan	Broker	Structured Security Co.	None
Frisbee	Alice	Broker	Structured Security Co.	View Cases
Cooper	Alice	Broker	Brant Hickey & Associates	None
Hull	Allan	Broker	Structured Security Co.	None
Richardson	Allan	Broker	The Alliance Settlement Cos.	None
Paul	Amy	Broker	Summit Settlement Services	None
Fisher	Andrew	Broker	Settlement Options	None
Hull	Andrew	Broker	Settlement Associates & Insurance Services, Inc.	None
Viera	Angel	Broker	American Settlement Corp.	None

<< < > >> Page: 1 of 2

- Contact Category
  - Public
  - Private

FIG 26

Managing your Diary (continued)

- Check Box for
  - Case Coordinator in Life Company
  - Broker in Broker Company
  - Attorney in Law Firm
  - Claim Adjuster in Insurer / TPA
  - Primary Contact in All Contacts

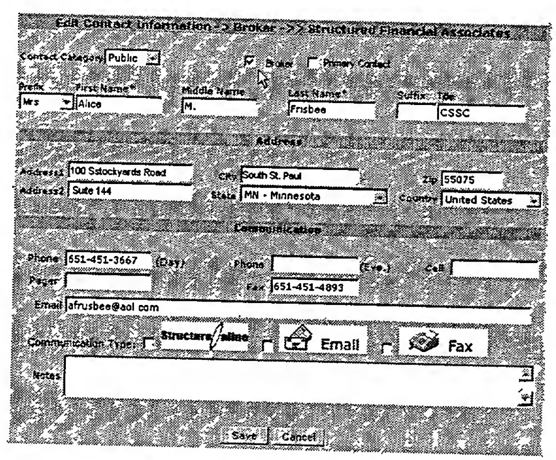


FIG 27

Managing your Diary (continued)

- Communication Type Check Box
  - StructureOnline Exchange
  - Fax
  - Email

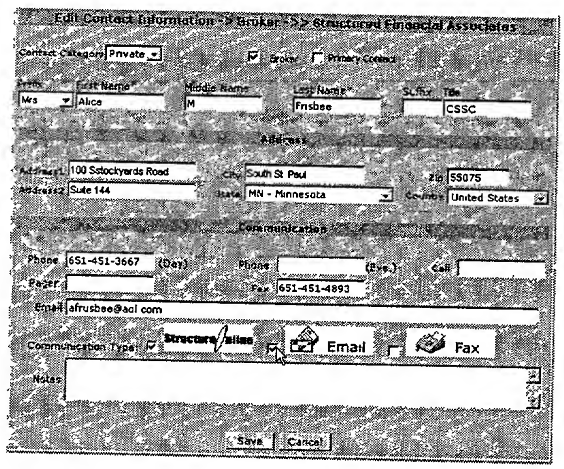


FIG 28

Managing your Diary (continued)

- Tasks – Open, Close, Details, Calendar

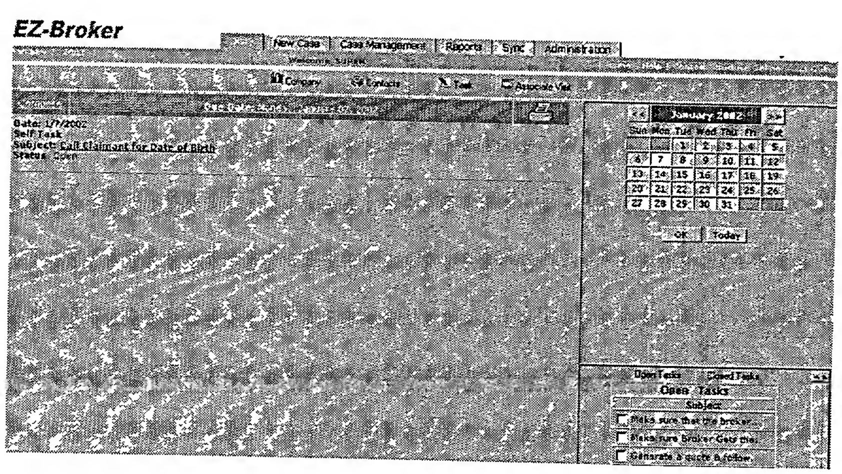


FIG 29

Managing your Diary (continued)

- Composing Non-case related task
  - From Home Page -> Compose
  - From Diary -> Task -> Compose

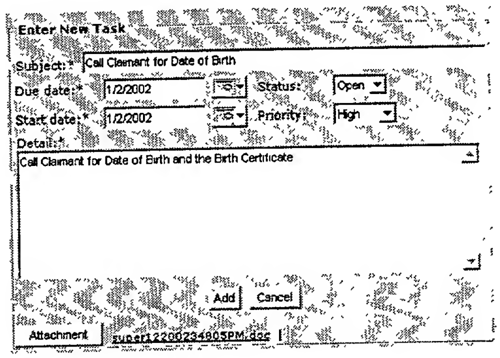


FIG 30

Managing your Diary (continued)

- Tracking visits to Clients (National Accounts only)
  - Name of the Insurance Company / Branch
  - Date of the Last Visit
  - Purpose
  - Next visit schedule
  - Cases Received
  - Notes

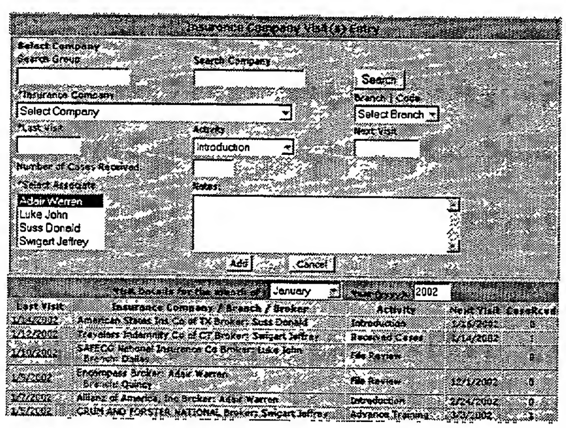


FIG 31

Searching for an existing Case (continued)

- From Home Page
  - Most recently worked on 10 cases

File No.	Caption	Date of Loss	Status
SFAsuper1219200133827AM	Paul Vs Manor Care	12/10/1998	LEAD ACCEPTED
SFAsuper1219200133459AM	Ann Vs Loves	8/9/2000	LEAD ACCEPTED
SFAmaryb1217200181403PM	Shirley Vs UPS	10/12/1999	LEAD ACCEPTED
SFAsuper1219200133551AM	Sarah Vs. Timberline Inc.	12/10/2001	LEAD ACCEPTED
SFAsuper1219200133248AM	Chris Vs Oracle Corp.	4/9/1998	LEAD ACCEPTED
SFAsuper1218200191943AM	Larry Vs Hands & Associates	5/7/2001	LEAD ACCEPTED
SFAsuper1212200111904AM	Tomothy Vs United Airlines	11/10/2000	LEAD ACCEPTED
SFAsuper12172001103120PM	Chris Vs General Electric	3/8/2001	LEAD ACCEPTED
SFAsuper1219200150235AM	Larry vs Whirlpool	10/12/2001	LEAD ACCEPTED
SFAsuper1217200144137PM	Charlie Vs EMC	4/5/1999	LEAD ACCEPTED

** Click here for more...

  - Based on Past Due Tasks

Date	Case	Subject	Priority
11/10/2001 12 55 00 PM	UHALT, CHARLES	Quote Followup - uhalt1	
11/10/2001 12:40 00 PM	UHALT, CHARLES	Quote Followup - uhalt	
11/08/2001 2.23 00 PM	FUENTES, ALEX	Quote Followup - fuentes	
11/08/2001 2 21 00 PM	FUENTES, ALEX	Quote Followup - fuentes	
10/31/2001	GRABER, MICHELLE	test	
10/26/2001 3.06 00 PM	PEACE, SHEILA*	Quote Followup - sheela	
10/24/2001 5 06 00 PM	YAMADA, KERRY	Quote Followup - kerry	

FIG 32

Searching for an existing Case (continued)

- From Case Management
  - Multiple Search Criterion

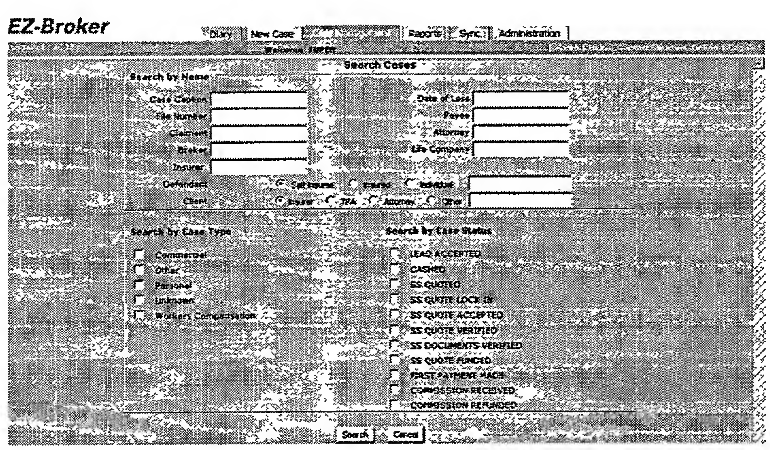


FIG 33

Searching for an existing Case (continued)

- **From Diary**
  - **Based on Company of any Type**

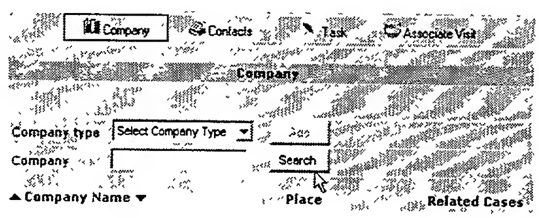


FIG 34

Searching for an existing Case (continued)

- **From Diary**
  - **Based on Contact Person of any Type**

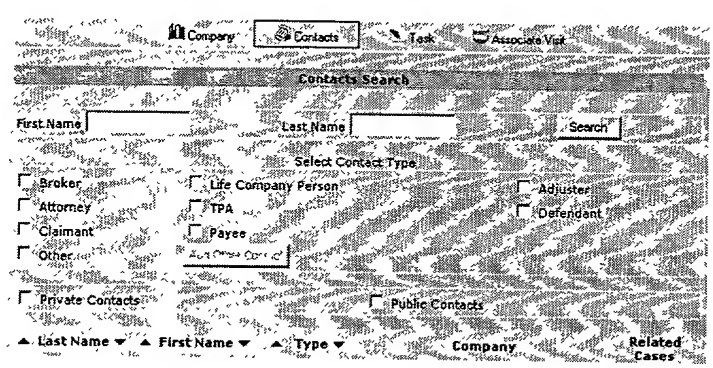


FIG 35

Generating a Quote for Fully Integrated Life Company (continued)

- **Select Claimant & Life Company; Click "Enter Quote Data"**

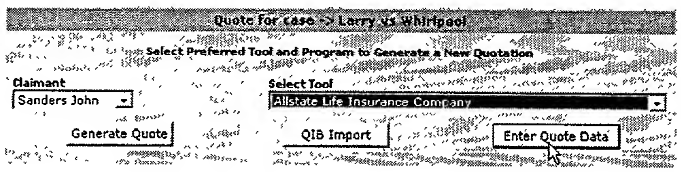


FIG 36

Generating a Quote for Fully Integrated Life Company (continued)

- **Select the Rate Series; Save the Quote**

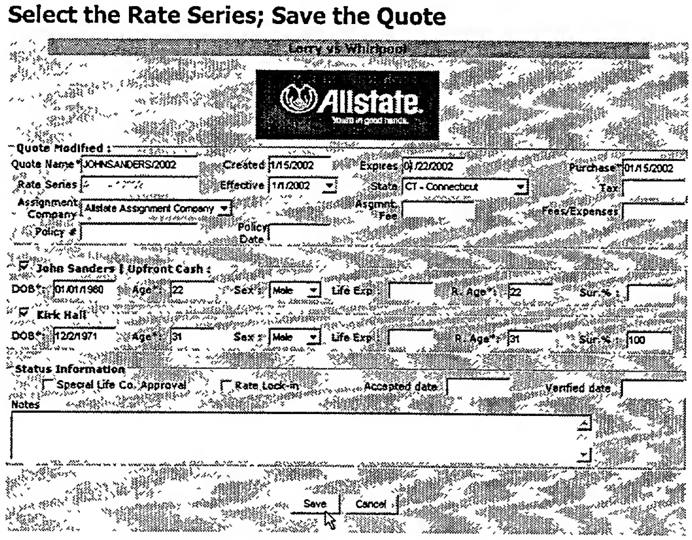


FIG 37

Generating a Quote for Fully Integrated Life Company (continued)

- **Start adding benefits & click "Calculate"; Save at the end**

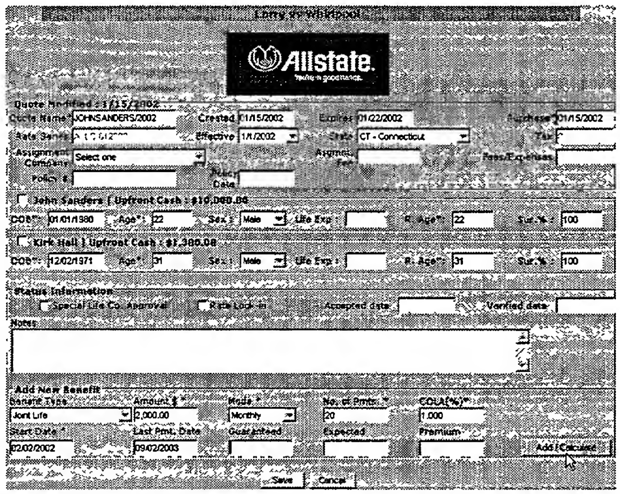


FIG 38

Generating a Quote for Partially Integrated Life Company (continued)

- **Select Claimant & Life Company; Click "Generate Quote"**

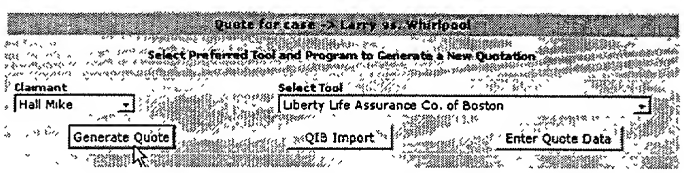


FIG 39

Generating a Quote for Partially Integrated Life Company (continued)

- **QIB Tool is opened now; Click File -> Import; Select file C:\QIBImpExp\filename.exp**

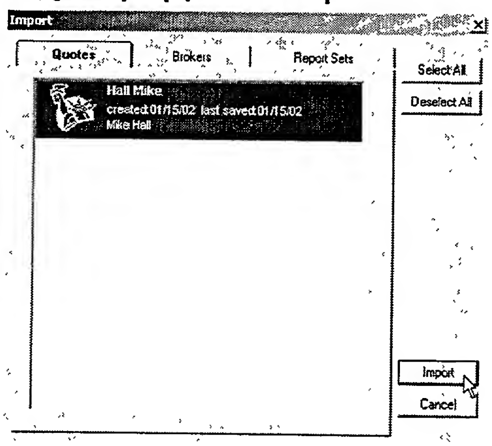


FIG 40

Generating a Quote for Partially Integrated Life Company (continued)

- **Quote data has been Imported now; Click File -> Open Quote -> Edit**

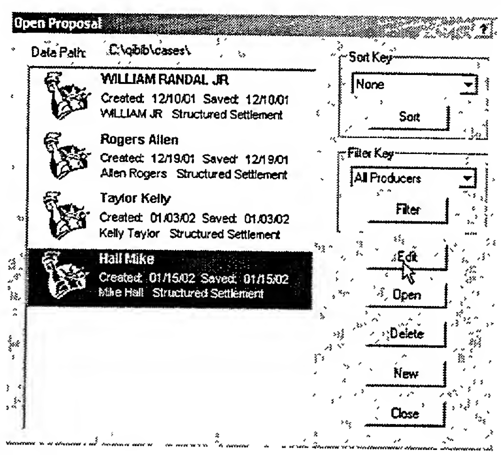
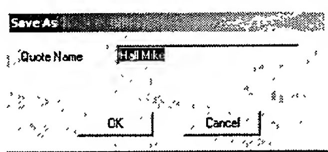


FIG 41

Generating a Quote for Partially Integrated Life Company (continued)

- Check all imported information from Quote Specification or Quick Quote window.
- Start adding benefit information -> Add Benefit
- Quote String Carryover between Tools (Change mode if not mentioned)
- Save -> Quote Name ->Ok



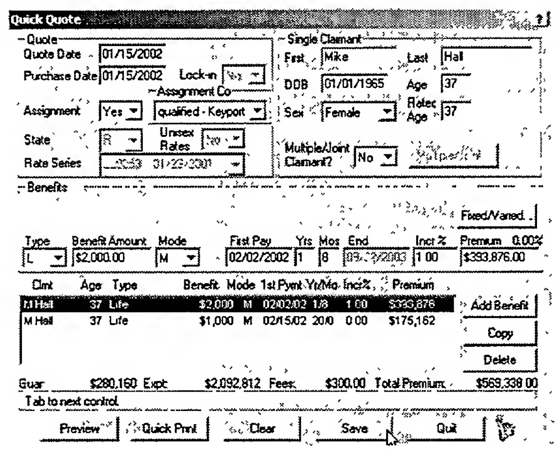


FIG 42

Generating a Quote for Partially Integrated Life Company (continued)

- To Export Quote Data; File-> Export
- Select file C:\QIBImpExp\claimantname.exp -> Click on Save

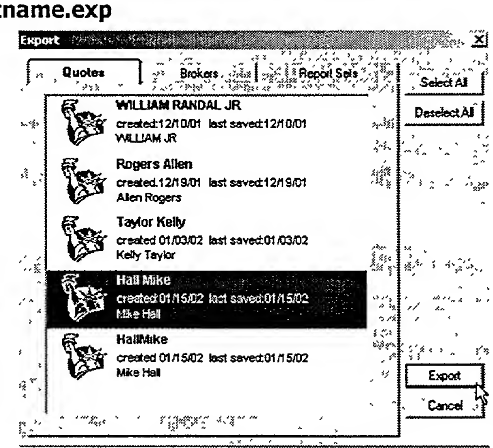
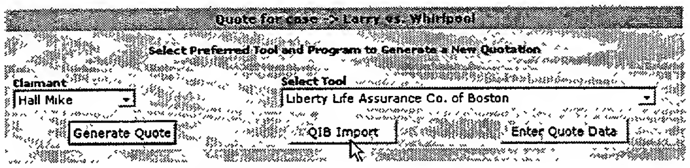


FIG 43

Generating a Quote for Partially Integrated Life Company (continued)

- **Click on QIB Import**



- **Click on Browse and select the file to Import; Click on Import -> Close**

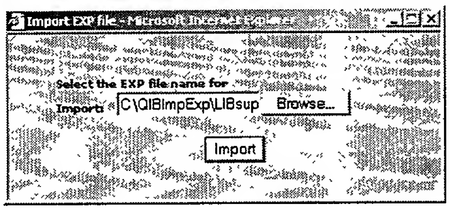
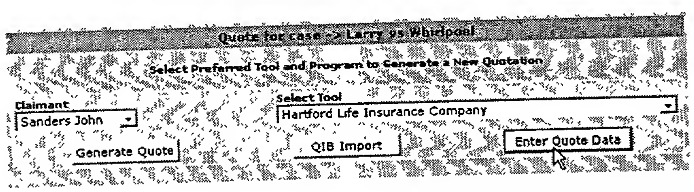


FIG 44

Generating a Quote for not Integrated Life Company (continued)

- **Select Claimant & Life Company; Click "Enter Quote Data"**



- **Copy / Paste the data from Life Company Tool manually (Unfortunately)**

FIG 45

Generating a Quote for not Integrated Life Company (continued)

- Select the Rate Series; Save the Quote
- Start adding benefits & click "Calculate"; Save at the end

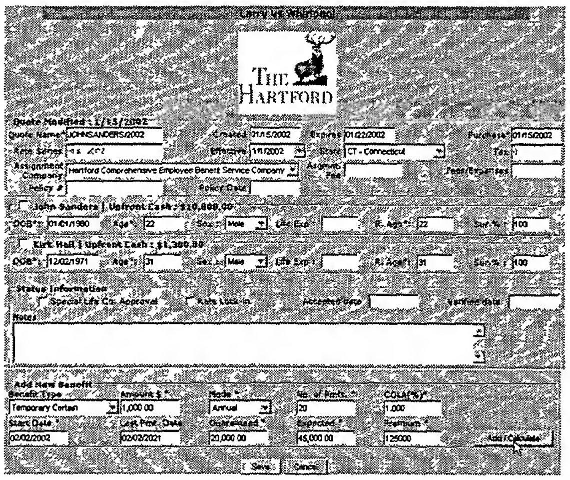


FIG 46

Proposal - Documents (continued)

- Select the Quote & Appropriate Proposal Template; Click "Generate Proposal"

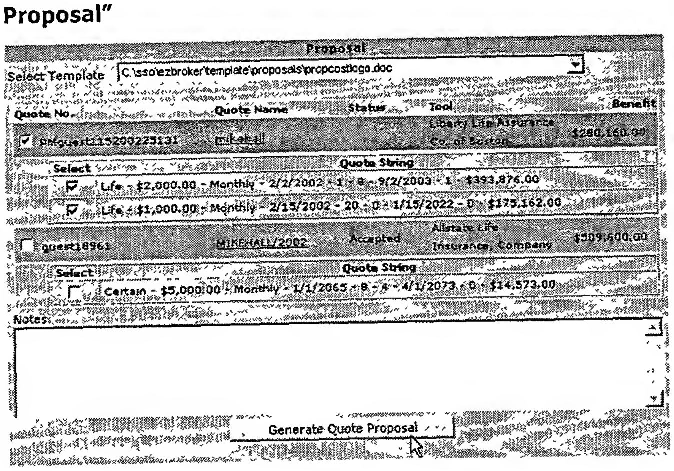


FIG 47

Cover Letter - Documents (continued)

- **Creating a Cover Letter to Life Company**

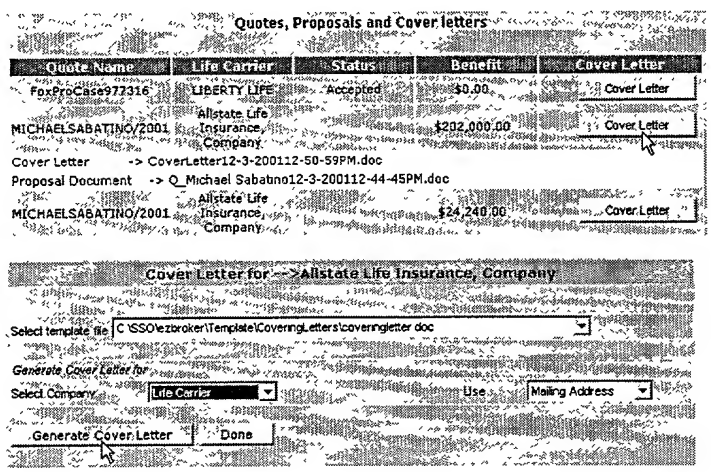


FIG. 48

Cover Letter - Documents (continued)

- **Creating a Cover Letter to Insurance Company**

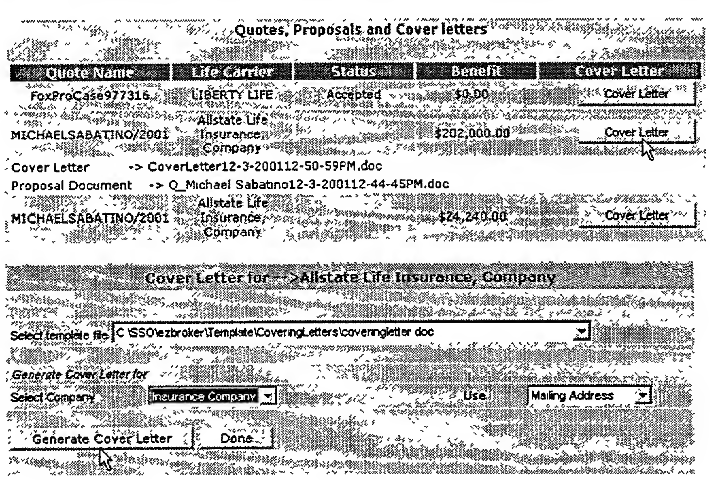


FIG 49

Post Settlement Document - Documents (continued)

- **Creating a Post-Settlement Document from Template**

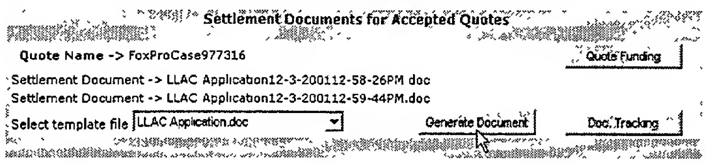


FIG 50

Document Attachment - Documents (continued)

- **Attaching a Document for e-filing**
  - **Any Scanned Data Files**
  - **Any Electronically Generated Documents (Word, Excel, etc.)**

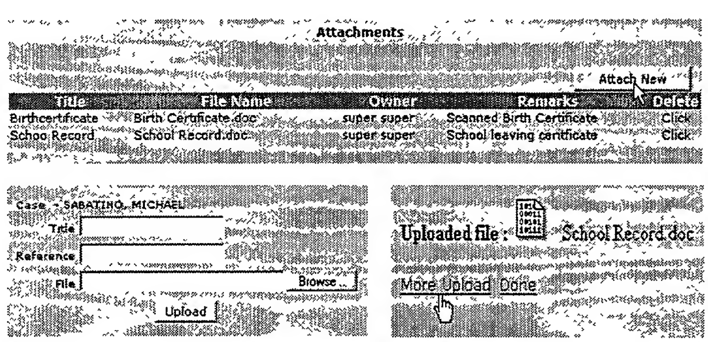


FIG 51

Quote Acceptance Update to Case

- Click on the Quote to view details
- Enter the Date in Quote Accepted Field;
- Don't forget to Save

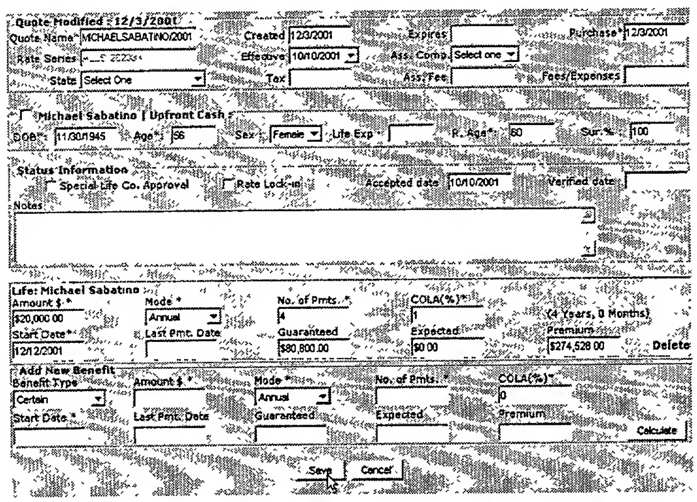


FIG 52

Quote Verification Update to Case

- HOCA verifies an accepted Quote
  - Current Rate Series
    - Exception of Special Approval of Life Company
  - Underwriting Guidelines
  - One more rule

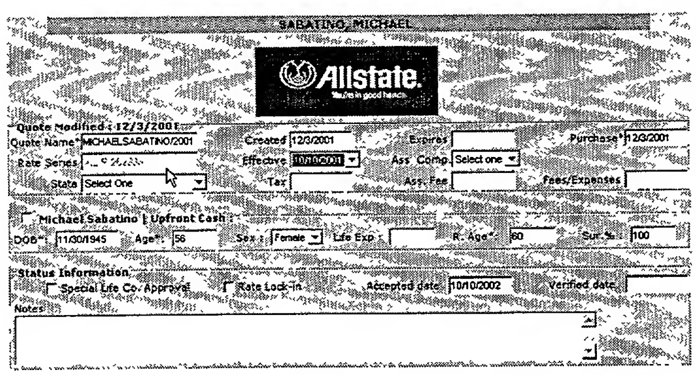


FIG 53

Tracking Documents

- **Track any document from your e-file**

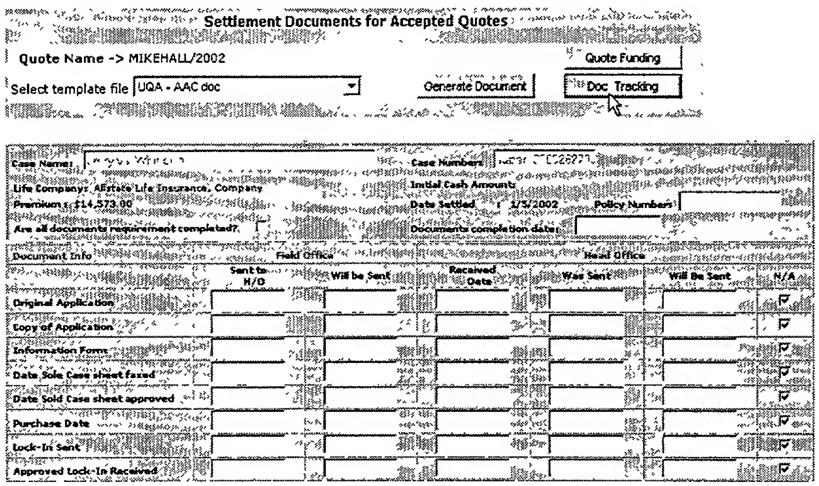


FIG 54

Communicating with Support, Home Office, Clients & Vendors

- Important Communication Check Box on Contact Information in Diary

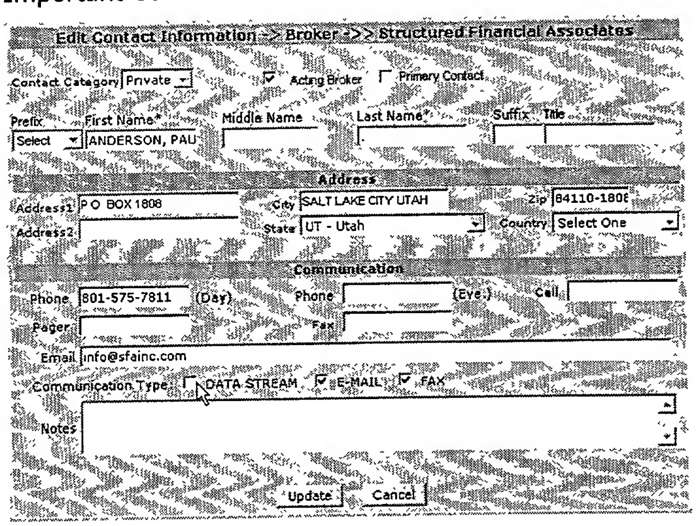


FIG 55

Generating Reports

- Go to Reports Tab to Generate following Reports
  - 1. Associates Reports
  - 2. Carrier Reports
  - 3. Defendant Reports
  - 4. Outstanding Reports
  - 5. Insurance Company Reports
  - 6. Custom Reports

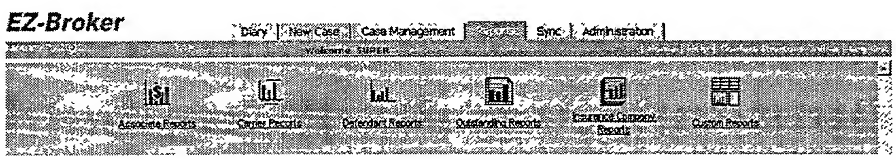


FIG 56

Generating Reports

- Standard Report generating Format (Super User or Executive)

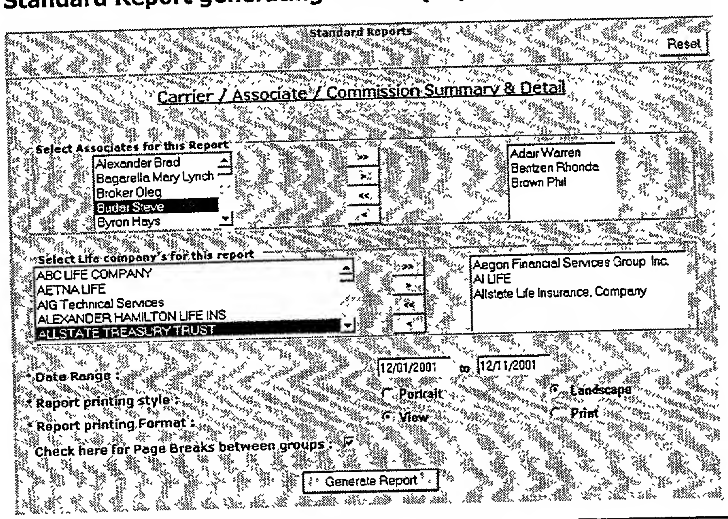


FIG 57

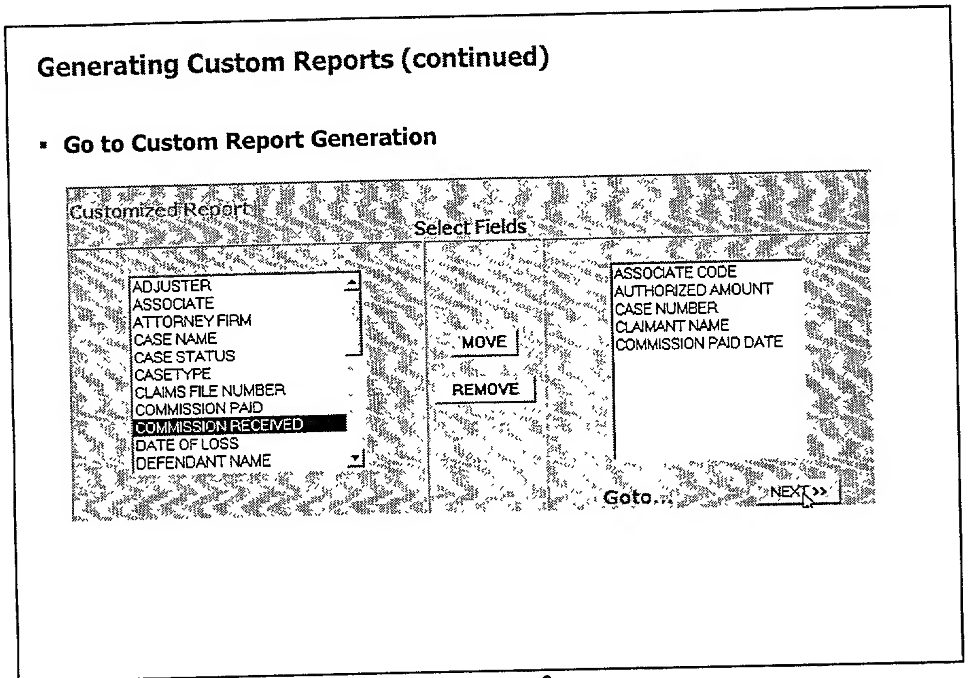

Generating Custom Reports (continued)
Go to Custom Report Generation
Customized Report
Select Fields
ADJUSTER
ASSOCIATE
ATTORNEY FIRM
CASE NAME
CASE STATUS
CASETYPE
CLAIMS FILE NUMBER
COMMISSION PAID
COMMISSION RECEIVED
DATE OF LOSS
DEFENDANT NAME
MOVE
REMOVE
ASSOCIATE CODE
AUTHORIZED AMOUNT
CASE NUMBER
CLAIMANT NAME
COMMISSION PAID DATE
Goto...
NEXT>>

FIG 59

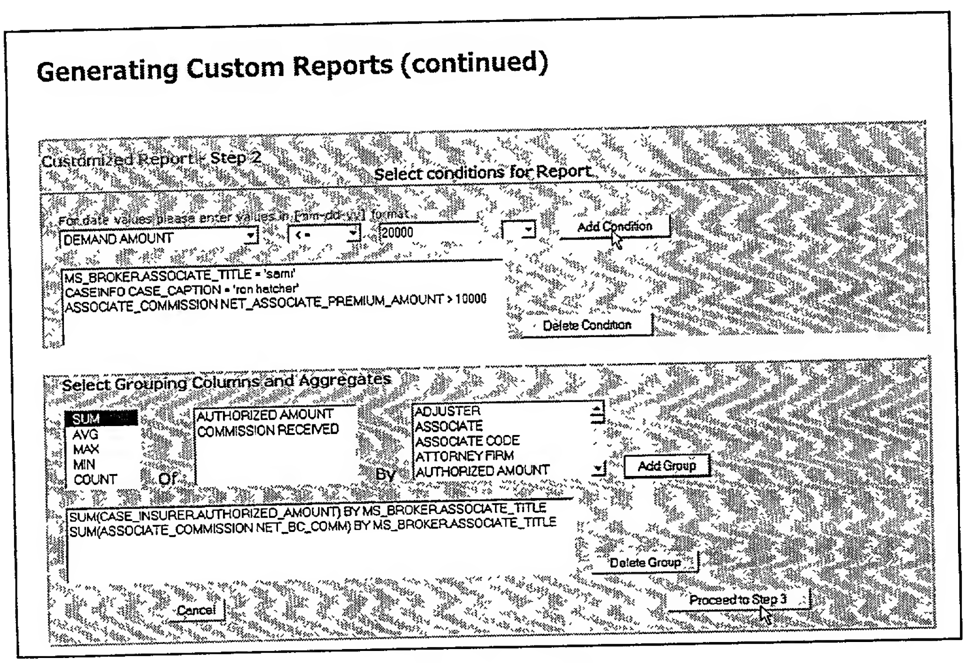

Generating Custom Reports (continued)
Customized Report - Step 2
Select conditions for Report
DEMAND AMOUNT
20000
Add Condition
MS_BROKER.ASSOCIATE_TITLE = 'sami'
CASEINFO.CASE_CAPTION = 'ron hatcher'
ASSOCIATE_COMMISSION.NET_ASSOCIATE_PREMIUM_AMOUNT > 10000
Delete Condition
Select Grouping Columns and Aggregates
SUM
AVG
MAX
MIN
COUNT
Of
AUTHORIZED AMOUNT
COMMISSION RECEIVED
By
ADJUSTER
ASSOCIATE
ASSOCIATE CODE
ATTORNEY FIRM
AUTHORIZED AMOUNT
Add Group
SUM(CASE_INSURER.AUTHORIZED_AMOUNT) BY MS_BROKER.ASSOCIATE_TITLE
SUM(ASSOCIATE_COMMISSION.NET_BC_COMM) BY MS_BROKER.ASSOCIATE_TITLE
Delete Group
Cancel
Proceed to Step 3

FIG 60

Generating Reports

- **Standard Report generating Format (Associate, Support or Client)**

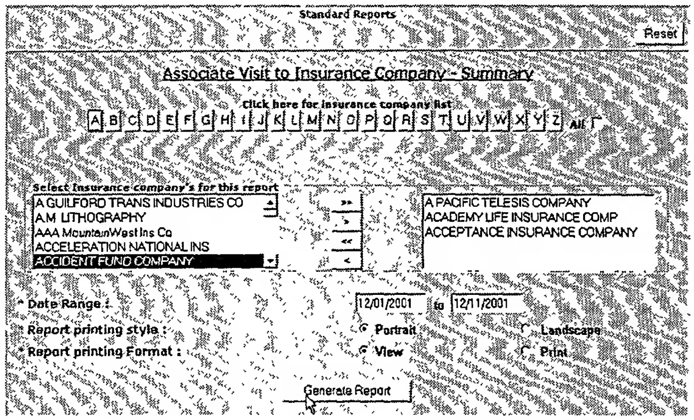


FIG 58

Generating Custom Reports (continued)

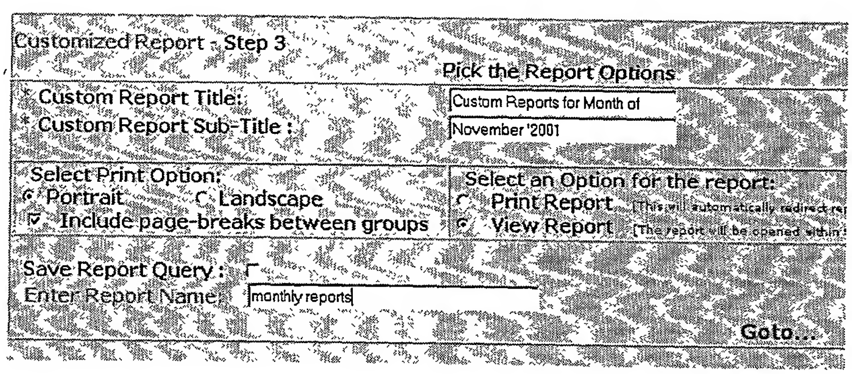


FIG 61